

Thomson Reuters HighQ

Procopio, Cory, Hargreaves & Savitch LLP

Propelling Law Firm Evolution

For Procopio, Cory, Hargreaves & Savitch LLP, technology is a key part of everything the firm does, and its partners and staff pride themselves on delivering intelligent legal solutions. An Am Law 200 firm with more than 180 lawyers on its staff, the firm provides full-service business law and litigation expertise from its offices in California, Nevada, and Arizona. Its reach is global, helping businesses as far as Europe, Asia, and Latin America. Since November 2017, Thomson Reuters® HighQ—the connected, automated workplace collaboration solution—has become more and more integral to the firm's operations, to the extent that Melodie Ford, manager of technology innovation says, "As HighQ evolves, we evolve, moving more tasks into it."

HighQ was initially brought on board to facilitate file sharing and to create deal rooms, given that Procopio advises on a significant amount of M&A work involving large volumes of documents. Previously the firm was using what they describe as "an antiquated system," where files had to be downloaded, printed, and manually reviewed, creating huge amounts of paperwork in what was a very time-consuming and inefficient process. Now information is centralized so that everyone knows where it is stored. Document review is automated using the HighQ AI Engine, saving time. And clients can upload, view, and manage their own documents, making collaboration easier. "The legal industry has been talking about paperless offices for 30 years. I think HighQ might actually help us get there," says Ford.

A Steady Stream of Use Cases

This early win soon led the firm to develop many other use cases for the solution. Next, under the direction of Tiffany O'Neil, director of knowledge management

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Manager of Technology Innovation

and technology innovation, Ford built what she calls a "wiki-style" data collaboration tool for the firm's COO, using HighQ to track various areas of research. Then, Procopio started using the iSheets module to streamline the patent filing process, and from there began to use iSheets to automate workflows more widely across the firm. The development of new ideas is continuously ongoing with O'Neil and Ford engaged in developing two or three new project ideas at any one time.

For a firm that conducts over 30% of its business with alternative fee arrangements, automating workflows is an essential saver of both time and cost. "Because we can do things faster and better due to the power of HighQ, we can give clients more for their money," says Ford. "Streamlining workflows so lawyers can do substantive work instead of clerical tasks gives them time to think so they enjoy their jobs more."

She adds that HighQ also makes it easier to collaborate with colleagues and clients and to manage risk. Lawyers know that they won't miss a filing deadline or overlook any other vital issues because calendars and tasks will be centralized and automatically populated with dates, with matter status visible in real time, and HighQ will send out alerts and reminders. Moreover, HighQ can even provide prompts or raise queries, such as outlining what signatures are required for a particular document or flagging up if someone enters a due date that falls on a non-business day.

Workflows can be configured so that, rather than having multiple emails circulated by different people, everything is accessible in one place, and documents can even be attached to those workflows. This makes matters easier to project-manage, and it increases productivity and reduces stress. "It's very important that it is easy for people to use. When people realize there's a better, more efficient way to do what they've always done, the fear factor is eliminated," explains Ford. "It's actually very freeing."

Access permissions can be set to a very granular level, so that people can be allowed to view just one piece of information if necessary. This flexibility around security means that internal and external users—such as opposing counsel, bidding parties, or public agencies—can get access to all the data and documents they need and nothing else. Ford points out that the visualization tools are invaluable in leading people to what they want to see or where they need to go within the deal room, for example, and providing a clear view of the relevant data. In her view, "HighQ is a central part of knowledge management."

Brainstorming Ideas

When Procopio was first introduced to HighQ by O'Neil, there were only ten users. Today, it has nearly 300 across the whole firm. "The minute I start talking about HighQ with different teams, they ask 'Can you make it do this for me?' There are just so many ways of using it," says Ford. Other projects in the pipeline include a plan to use HighQ for the highly complex process of litigation management and developing a project through which new legislative developments relating to employment law can be tracked.

"With a lot of software that's out there on the market, you're effectively on your own to build whatever you want yourself," says Ford. "HighQ comes with lots of built-in functionality and templates, but more importantly, you have a client success manager who will help you brainstorm ideas and hold your hand through the building process. They know the product inside out, and they'll say, 'Did you know you can do this with HighQ?' We have weekly meetings with our client success manager (which is my preference), and they never upsell to us,

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but they are as excited as we are about what else we can do with HighQ. This is fantastic software, but it's the responsive and enthusiastic service we get that is really important, from the client service contact, and the support team, through to sales. As much as HighQ itself is collaborative, so is the HighQ team."

Ford adds that this sense of collaboration extends further into the wider legal community as firms share their experiences and recommendations. She will often talk to other professionals about why they might find HighQ useful and has even shown it to them, endorsing it many times. O'Neil and Ford participate in "Fireside Chats" (customer meet-ups arranged by the HighQ team) to increase the collaborative spirit of HighQ.

As well as delivering internal productivity gains, HighQ has directly saved Procopio money by eliminating the need for three other pieces of software the firm was using within the space of three years. Ford explains that every time HighQ rolls out a new module or upgrade, she examines whether it can replace another application being deployed by the firm. While cutting costs is important, having more—and more intuitive—functionality on one platform makes it even easier to use. "It's nice to have one place where we can do myriad things," she says. "We do look at other tools that are out there, but HighQ isn't one of those applications where we periodically have to ask if we still need it. It's delivering so many improvements that the benefits are self-evident."

PROCOPIO, CORY, HARGREAVES & SAVITCH LLP

For more than seven decades, Procopio has been providing top quality legal expertise across more than 40 practice areas, including environmental law, tax, employment, and Native American law. It has offices in San Diego, Silicon Valley, Orange County, Las Vegas, and Phoenix.

BUSINESS CHALLENGES

To replace manual systems with streamlined, efficient processes, saving time for lawyers and money for clients, starting with the creation of digital deal rooms for M&A work, and moving into workflows across the firm.

WHY HIGHQ?

HighQ has comprehensive built-in functionality to enable smarter working practices by enhancing collaboration and automating processes, all with an intuitive, easy-to-use interface. The software is leading-edge, and the customer service on offer is second to none.

BENEFITS

- Transforms workflows, making lawyers' jobs easier and more enjoyable
- Cuts costs by enhancing productivity and reducing the need for other applications
- Huge scope for secure collaboration, internally and with multiple external parties
- Proactive customer service and support all along the customer journey
- Extensive scope for further use cases to be developed

For more information about HighQ, contact your HighQ Client Success Manager or visit HighQ.com.